



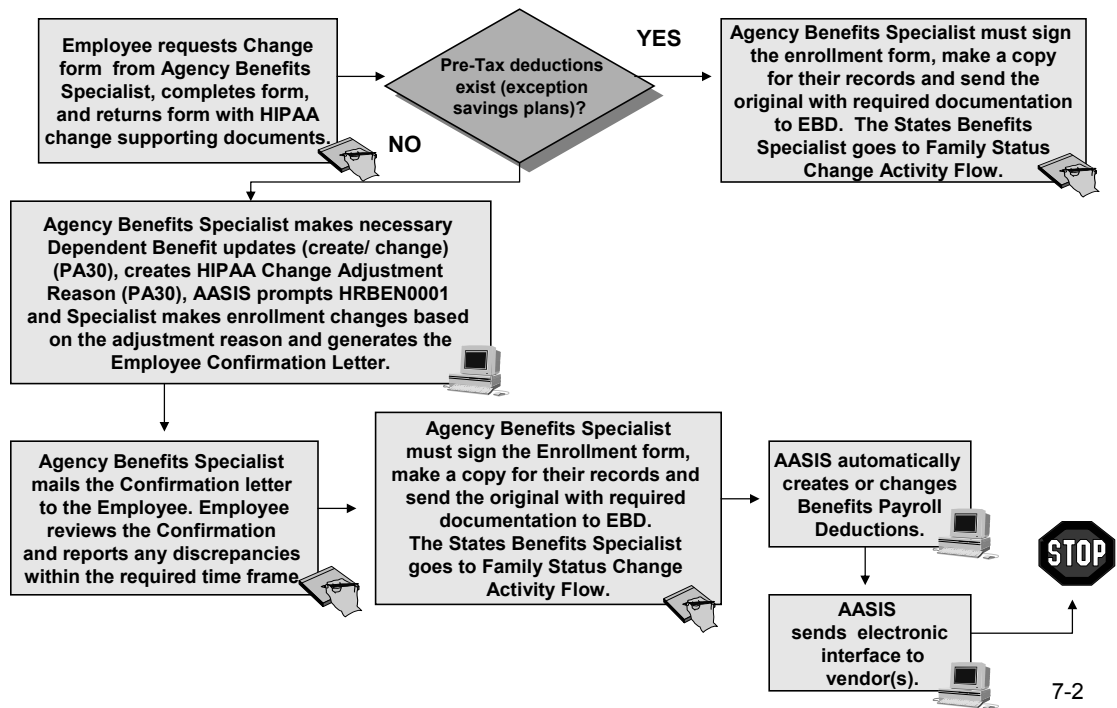
HRBEN

BENEFITS ADMINISTRATION

Chapter 7 – HIPAA Changes



HIPAA Change Task Flow–No Pre-Tax in Place



AASIS Support Center, DiAnnette Scott
July '04, Revised to V5.0

7-2

Refer to Plan documentation and the EBD Policy and Procedures manual to determine which plans an employee may choose for their HIPPA Event. Make sure to enroll the employee in the appropriate co-requisites.

Note: The enrollment form must be signed within 30 days of the event.



Exercise

Scenario #8

- A new employee waived all rights to a medical plan when hired because the employee was covered under another Plan.
- Later the employee married and decided to enroll into a Medical plan and add their spouse.

*This is considered a HIPAA event



Demonstration

- Create Benefit Enrollment - HIPAA Special Enrollment

Human Resources > Personnel Management >
Administration > HR Master Data > Maintain
(PA30/HRBEN0001)

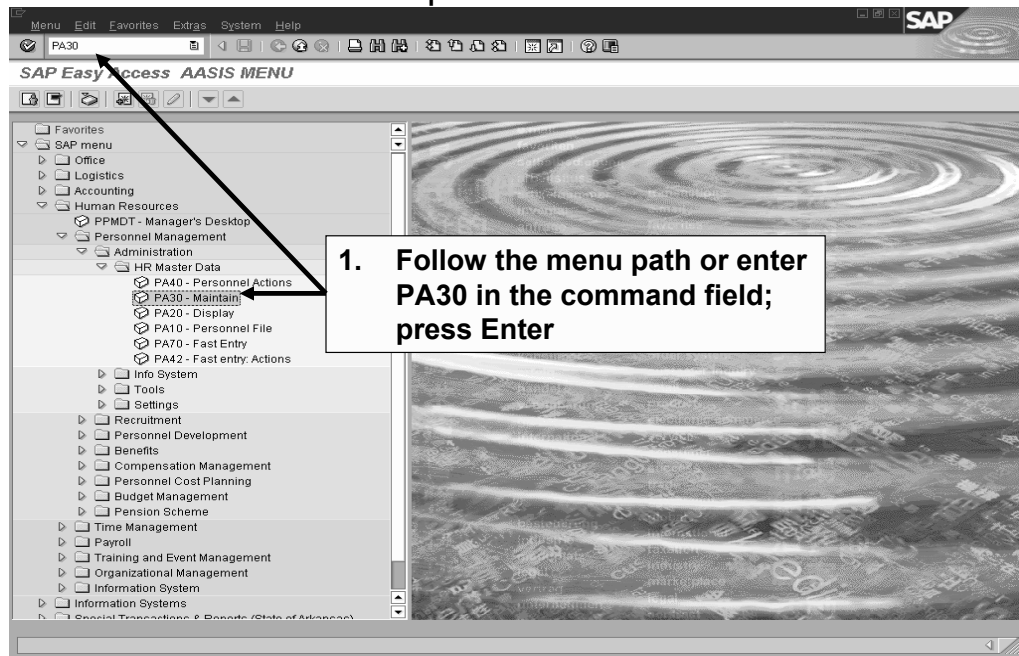


7-4



Create Benefit Enrollment

HIPAA Special Enrollment





Create Benefit Enrollment

HIPAA Special Enrollment

The screenshot shows the SAP HR Master Data interface. The main window is titled "Maintain HR Master Data". The top menu bar includes "HR master data", "Edit", "Goto", "Extras", "Utilities", "Settings", "System", and "Help". The SAP logo is in the top right corner. The main area displays employee data for "Personnel no. 18", "Name Susan Wainwright", "EE group 1 Regular State", "Pers.area FA01 DFA", "st Center 383201", and "DFA".

Annotations with arrows point to specific fields and actions:

- 2. Enter the employee's personnel number**: Points to the "Personnel no." field.
- 4. Click Display**: Points to the "Display" icon in the toolbar.
- 3. Select Personal Data or enter 0002 in the Infotype field**: Points to the "Infotype" field in the "Direct selection" section, which currently contains "b002".

The "Direct selection" section also includes a "Period" dropdown menu with options: "Today", "A11", "From curr. date", "To current date", "Curr. period", "Curr. week", "Current month", "Last week", "Last month", and "Current Year".

7-6

AASIS Support Center, DiAnnette Scott
July '04, Revised to V5.0

It is the responsibility of the State/Agency Personnel Management role to make marital status changes. To view this information, you will need to access the PA30 and choose Display to make sure changes have been made prior to proceeding with a HIPAA enrollment.

Note: If you do not know the employee's personnel number, use the match code search functionality to search by name.



Create Benefit Enrollment

HIPAA Special Enrollment

6. Click to Exit

5. View martial status prior to proceeding with HIPAA enrollment.

Display Personal Data

Personnel No: 10
EE group: 1 Regular State Em., Personnel ar: FA01 DFA
EE subgroup: UE Employee SSN: 013-19-0947
Start: 01/01/1960 To: 12/31/9999 Changed on: 10/12/2004 DLSCOTT

Name
Title: [] Name format: 00
Last name: Wainwright Birth name: []
First name: Susan Second name: []
Middle name: [] Initials: []
Designation: [] Known As: []
Suffix: []
Name: Susan Wainwright

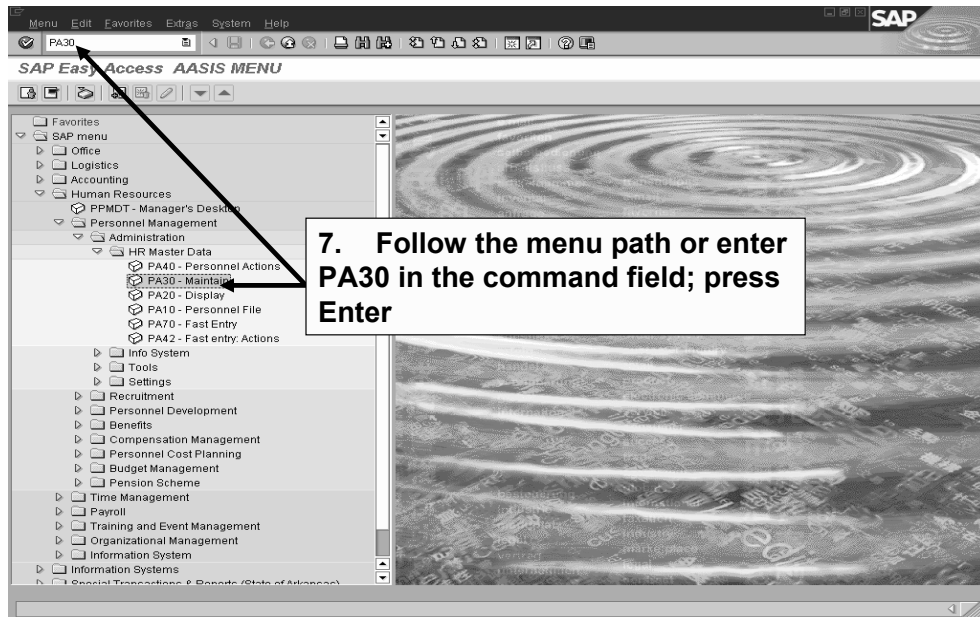
HR data
SSN: 013-19-0947 Gender: ☐ Female ☐ Male ☒ Undeclared
Date of Birth: 01/01/1960
Language: English
Nationality: []
Marital status: Marr. []

7-7



Create Benefit Enrollment

HIPAA Special Enrollment





Create Benefit Enrollment

HIPAA Special Enrollment

The screenshot shows the SAP HR Master Data maintenance interface. At the top, the title bar reads "HR master data" and the menu bar includes "Edit", "Goto", "Extras", "Utilities", "Settings", "System", and "Help". The main window title is "Maintain HR Master Data". Below this, a toolbar contains icons for various functions. The main data area displays employee information: "Personnel no." 18, "Name" Susan Wainwright, "Emp. group" 1, "Regular State", "Pers. area" PA01, "DFA", "Ter" 383201, and "DFA".

Annotation 8: A callout box with the text "8. Enter the employee's personnel number" has an arrow pointing to the "Personnel no." field.

Annotation 9: A callout box with the text "9. Select Family Member/Dependent or enter 0021 in the Infotype field" has an arrow pointing to the "Infotype" field in the "Direct selection" section, which currently contains "0021".

The left sidebar lists various infotype categories: "Infotype text", "Actions", "Organizational Assignment", "Personal Data", "Addresses", "Bank Details", "Family Member/Dependents" (highlighted), "Challenge", "Internal Medical Service", and "Maternity Protection/Parental Leave". The right sidebar shows a "Period" selection area with radio buttons for "Today", "All", "From curr. date", "To current date", "Curr. period", "Curr. week", "Current month", "Last week", "Last month", and "Current Year", along with a "Choose" button.



Create Benefit Enrollment

HIPAA Special Enrollment

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 18
Name Susan Wainwright
EE group 1 Regular State
EE subgroup UE Employee

Basic personal data Contract data

Infotype text
Actions
Organizational Assignment
Personal Data
Addresses
Bank Details
Family Member/Dependents
Challenge
Internal Medical Service
Maternity Protection/Parental Leave

Direct selection
Infotype 0021

Subtypes for infotype "Family Member/Dependents" (1) 12 Entries Found

STyp	Name
1	Spouse
10	Divorced spouse
11	Father
12	Mother
2	Child
3	Custodial Child
4	Testator
5	Guardian
6	Stepchild
7	Emergency contact
8	Related persons
9	Other

12 Entries Found

11. Choose subtype



Create Benefit Enrollment

HIPAA Special Enrollment

The screenshot shows the SAP 'Create Family Member/Dependents' form. The form is divided into several sections: 'Personal data', 'Physician', 'Challenge', and 'Status'. The 'Personal data' section includes fields for Last name, First name, Title, Gender, Birth date, SSN, Street, City/State, Zip/country, Birth name, and Initials. The 'Physician' section includes fields for Physician1, ID Number, Physician2, and ID Number. The 'Challenge' section includes checkboxes for Disability and Learned, and a field for Disability Date. The 'Status' section includes checkboxes for Student Indicator, Medicare, Smoker, Military Service, and Fin. Indep. Callouts indicate the following steps: 12. Enter the Event date (pointing to the 'Event date' field), 13. Enter applicable information in all required fields (pointing to the 'Personal data' section), and 14. Click to Save (pointing to the 'Save' button).

AASIS Support Center, DiAnnette Scott
July '04, Revised to V5.0

7-11

- When entering the applicable information, the last name will automatically default, change if needed.

- According to EBD's Policy and Procedures, the dependent's Social Security number, Date of Birth, Primary Care Physician, and ID number, if applicable, all must be entered in AASIS at the time of enrollment. For newborns, enter the default SSN# given by EBD until the correct SSN# has been received.

- Example: **888**-(last 6 #'s of the employee's SSN#)

- Twins: **888-88**-(last 4 digits of the employee's SSN)

- You will receive the following message: "Record created" this is for the update made to the Copy Personal Data Infotype.



Create Benefit Enrollment

HIPAA Special Enrollment

The screenshot shows the SAP HR Master Data maintenance interface. The title bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The SAP logo is in the top right corner. The main window is titled 'Maintain HR Master Data'. Below the title bar, there are fields for 'Personnel no.' (18), 'Name' (Susan Wainwright), 'EE group' (1 Regular State), 'Pers. area' (FA01 DFA), 'EE subgroup' (UE Employee), and 'Cost Center' (383201 DFA). A tabbed interface is visible with 'Personal Data' selected. The 'Personal Data' tab shows a list of infotypes on the left and a 'Period' selection area on the right. The 'Period' section has radio buttons for 'Today', 'A11', 'From curr. date', 'To current date', 'Curr. period', 'Curr. week', 'Current month', 'Last week', 'Last month', and 'Current Year'. A 'Choose' button is also present. At the bottom, a message box states 'Note: Record has been created'. The status bar at the very bottom indicates 'Record created'.



Create Benefit Enrollment

HIPAA Special Enrollment

The screenshot shows the SAP HR Master Data maintenance interface. At the top, the menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main window title is 'Maintain HR Master Data'. The 'Personnel no.' field contains '18'. Below this, there are fields for 'FA01', 'DFA', '383201', and 'DFA'. A tabbed interface is visible with tabs for 'Benefits', 'Payroll', 'Taxes', 'Garnishments', and 'Time'. The 'Benefits' tab is active. On the left, a list of infotype categories is shown: 'Infotype text', 'General Benefits Information', 'Family Member/Dependents', 'Adjustment Reasons', 'Health Plans', 'Insurance Plans', 'Savings Plans', 'Flexible Spending Accounts', 'Benefits Medical Information', and 'COBRA-Qualified Beneficiary'. The 'Adjustment Reasons' category is selected. On the right, the 'Period' section is visible, with radio buttons for 'Today', 'A11', 'From curr. date', 'To current date', 'Curr. period', 'Curr. week', 'Current month', 'Last week', 'Last month', and 'Current Year'. A 'Choose' button is located below the period options. At the bottom, the 'Direct selection' section is visible, with the 'Infotype' field containing '0378' and a 'STy' button. Two callout boxes are present: one at the top left pointing to the 'Adjustment Reasons' category with the text '16. Click to Create', and another at the bottom left pointing to the '0378' value in the 'Infotype' field with the text '15. Select Adjustment Reason or enter 0378 in the Infotype field'.



Create Benefit Enrollment

HIPAA Special Enrollment

19. Click Enter

17. Enter the '1st of the month' effective date of coverage

18. Select the appropriate Adjustment Reason from the drop-down list

Personnel No	18	Name	Susan W.	Status	Active
EE group	1	Regular State Em...	Personnel ar	FA01	
EE subgroup	UE	Employee	SSN	013-19-0	
Start	07/01/2004				

Adjustment Reason Data

Benefit area	State of Arkansas-US
Adjustment reason	HIPAA

Family Status Change
HIPAA
New Hire Enrollment
Transfer(Rtr. Plans)
Transfer (All Plans)
Return from LWOP
Misc Benefit Changes
Promotion/Demotion
Rehire

7-14

AASIS Support Center, DiAnnette Scott
July '04, Revised to V5.0

- The effective date is determined by the 1st day of the month following the date the employee signed their application.

Note: An example for step 17 is as follows: *The employee signed and dated their application June 29, 2004. Therefore, the first of the month following the signed and dated application date is July 1, 2004.*



Create Benefit Enrollment

HIPAA Special Enrollment

SAP

Create Adjustment Reasons

Personnel No	18	Name	Susan W.	Status	Active
EE group	1	Regular State Em.	Personnel ar	FA01	DFA
EE subgroup	UE	Employee	SSN	013-19-0947	
Start	07/01/2004	to	12/31/9999		

Adjustment Reason Data

Benefit area: State of Arkansas-US

Adjustment reason: HIPAA

Deviation from end date

Current end date: 12/31/9999
Calculated end date: 07/31/2004

Do you want to replace the current end date with the calculated end date?

20. Click Yes



Create Benefit Enrollment

HIPAA Special Enrollment

SAP

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

21. Click to Save

Personnel No	18	Name	Susan V...	Status	Active
EE group	1	Regular State Em...	Personnel ar	FA01	DFA
EE subgroup	UE	Employee	SSN	013-19-0947	
Start	07/01/2004	to	07/31/2004		

Adjustment Reason Data

Benefit area	State of Arkansas-US
Adjustment reason	HIPAA

Save your entries

7-16



Create Benefit Enrollment

HIPAA Special Enrollment

Create Adjustment Reasons

Personnel No. 18 Name Susan W. Status Active

EE group 1 Regular State Em... Personnel ar FA01 DFA

EE subgroup UE Employee SSN 013-19-0947

Start 07/01/2004 to 07/31/2004

Adjustment Reason Data

Benefit area State of Arkansas-US

Adjustment reason HIPAA

Go to enrollment

Do you want to go to enrollment?

Yes

No

Cancel

22. Click Yes



Create Benefit Enrollment

HIPAA Special Enrollment

Enrollment

Direct selection Selection set

Personnel no. []

ID number []

Select

Pers.No. Name

18 Susan Wainwright

Enroll

Name Susan Wainwright on 07/06/2004 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
HIPAA	07/01/2004 - 07/31/2004
Time changes	01/01/1800 - 12/31/9999
Automatic offer	

23. Double click on HIPAA

7-18



Create Benefit Enrollment

HIPAA Special Enrollment

Enrollment

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No. Name

18 Susan Wainwright

Enroll

Name Susan Wainwright on 08/05/2004 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
HIPAA	07/06/2004 - 08/05/2004
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

HIPAA

Enroll Costs Undo selection Error list

Medical

- Health Advantage HMO
- QualChoice HMO
- Health Advantage POS
- QualChoice POS
- Blue Cross Blue Shield PPO
- Nova Sys HMO
- NovaSys POS
- NovaSys PPO
- High Deductible PPO

Basic Life

- US Able (Basic EE Life ASE)
- Dependent Life
- US Able (Basic DEP Life ASE)
- Opt. Dep. Life
- US Able (Opt DEP Life ASE)
- Optional Life

24. Double click the Employee's appropriate Benefits elections

7-19

AASIS Support Center, DiAnnette Scott
July '04, Revised to V5.0

Enter the appropriate Benefits elections based upon employee elections and rules.

Note: Refer to plan documentation and the EBD Policy and Procedures manual to determine which plans an employee may choose for their HIPAA Event.



Create Benefit Enrollment

HIPAA Special Enrollment

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set Enroll

Maintain Health Plan

Pers.No. 18 Susan Wainwright

Plan Health Advantage HMO

Start 07/08/2004 - 12/31/9999

Stop participation in period

Option Dependents

Plan options

Health Plan Opt Standard HMO ASE1

Dependent Cover Employee

Costs USD Monthly

Employee 61.22 Deductions Pre-

Employer 0.00

Accept

25. Click on the *Dependents* tab to view the Employee's Dependents

ts	Status	Validity period	Activity
HMO		07/08/2004 - 12/31/9999	
OS		07/08/2004 - 12/31/9999	
ield PPO		07/08/2004 - 12/31/9999	
		07/08/2004 - 12/31/9999	
		11/21/2004 - 12/31/9999	
		11/21/2004 - 12/31/9999	
		11/21/2004 - 12/31/9999	
		11/21/2004 - 12/31/9999	
		07/08/2004 - 12/31/9999	
		07/08/2004 - 12/31/9999	
		07/08/2004 - 12/31/9999	
		07/08/2004 - 12/31/9999	

Dependent Life

US Able (Basic DEP Life ASE)

Opt. Dep. Life

US Able (Opt DEP Life ASE)

Optional Life

Create Benefit Enrollment

HIPAA Special Enrollment

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set Enroll

Maintain Health Plan

Pers.No. 18 Susan Wainwright

Plan Health Advantage HMO

Start 07/08/2004 12/31/9999

Stop participation in period

Option Dependents

Select Name Type of dep./ben.

☒ Ralph Wainwright Spouse

Accept

27. Return to the *Option* tab by clicking the tab

Click the box to roll the dependent

Status	Validity period	Activity
MO	07/08/2004 - 12/31/9999	
OS	07/08/2004 - 12/31/9999	
ield PPO	07/08/2004 - 12/31/9999	
	11/21/2004 - 12/31/9999	
	11/21/2004 - 12/31/9999	
	11/21/2004 - 12/31/9999	
	11/21/2004 - 12/31/9999	
	11/21/2004 - 12/31/9999	
Life ASE)	07/08/2004 - 12/31/9999	
Dependent Life		
US Able (Basic DEP Life ASE)	07/08/2004 - 12/31/9999	
Opt. Dep. Life		
US Able (Opt DEP Life ASE)	07/08/2004 - 12/31/9999	
Optional Life		

AASIS Support Center, DiAnnette Scott
July '04, Revised to V5.0

7-21

If the new dependent's name is not reflected in the Plan, please refer to Troubleshooting Note #3.



Create Benefit Enrollment

HIPAA Special Enrollment

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection: Maintain Health Plan

Pers.No. 18 Susan Wainwright

Plan Health Advantage HMO

Start 11/30/2004 - 12/31/9999

Stop participation in period

Option Dependents

Plan options

Health Plan Opt Standard HMO ASE1

Dependent Cover Emp + Spouse 1

Costs USD Monthly

Employee 336.74 Deductions Pre-

Employer 0.00

Accept

28. Select the Dependent coverage chosen by the Employee

29. Click to Accept

Pers.No.	Name
18	Susan Wainwright
1403	Nicholas Newman
1402	Neil Winters

US Able (Basic EE Life ASE)	11/30/2004 - 12/31/9999
Dependent Life	
c DEP Life ASE)	11/30/2004 - 12/31/9999
DEP Life ASE)	11/30/2004 - 12/31/9999

Note: In selecting the Dependent coverage, make sure that the choice corresponds to the coverage chosen under the Health Plan.



Create Benefit Enrollment

HIPAA Special Enrollment

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No. Name

18 Susan Wainwright

Enroll Name Susan Wainwright on 08/07/2004 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
HIPAA	07/08/2004 - 08/07/2004
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

HIPAA

Enroll Costs Undo selection Error list

	Status	Validity period	Activity
Medical			
Health Advantage HMO		07/08/2004 - 12/31/9999	
QualChoice HMO		07/08/2004 - 12/31/9999	
		07/08/2004 - 12/31/9999	
		07/08/2004 - 12/31/9999	
		07/08/2004 - 12/31/9999	
		11/21/2004 - 12/31/9999	
		11/21/2004 - 12/31/9999	
		11/21/2004 - 12/31/9999	
Basic Life			
US Able (Basic EE Life ASE)		07/08/2004 - 12/31/9999	
Dependent Life			
US Able (Basic DEP Life ASE)		07/08/2004 - 12/31/9999	
Opt. Dep. Life			
US Able (Opt DEP Life ASE)		07/08/2004 - 12/31/9999	
Optional Life			

30. Click Enroll



Create Benefit Enrollment

HIPAA Special Enrollment

Note: Verify that you have enrolled the Employee + Dependents in the correct plans

31. Click Enroll



Create Benefit Enrollment

HIPAA Special Enrollment

The screenshot shows the SAP HRBEN - Benefits Administration interface. The main window is titled 'Enrollment' and contains several tabs: 'Direct selection', 'Selection set', 'Enroll', 'Offer selection', 'Print form', and 'Error list'. The 'Enroll' tab is active, showing a form for 'Susan Wainwright' with the date '08/07/2004'. Below this, there is a table with columns 'Status', 'Validity period', and 'Activity'. The table lists various insurance plans, including 'Health Advantage HMO', 'QualChoice HMO', 'Health Advantage POS', 'QualChoice POS', 'Blue Cross Blue Shield PPO', 'va Sys HMO', 'va Sys POS', 'va Sys PPO', 'Health Deductible PPO', 'Basic Life', 'US Able (Basic EE Life ASE)', 'Dependent Life', 'US Able (Basic DEP Life ASE)', 'Opt. Dep. Life', 'US Able (Opt DEP Life ASE)', and 'Optional Life'. A message box in the center of the screen displays 'Enrollment completed successfully'. A callout box with an arrow points to the 'Confirmation' button, with the text: '32. *Click Confirmation; Follow print instructions'.

Note: Confirmation of enrollment is required to supply the Employee with Verification of Benefits.

Instructions on how to print Confirmation letters are demonstrated in Chapter 2.



Create Benefit Enrollment

HIPAA Special Enrollment

The screenshot shows the SAP HRBEN - Benefits Administration interface. The main window is titled "Enrollment" and has a menu bar with "Enrollment", "Edit", "Goto", "System", and "Help". The "Enrollment" menu is open, showing options like "Direct selection", "Selection set", "Enroll", "Offer selection", "Print form", "Error list", "Costs", "Undo selection", and "Error list". The "Enroll" option is selected, and the "Enrollment period" is set to "07/08/2004 - 08/07/2004". The "Offer selection" is set to "01/01/1800 - 12/31/9999". The "Enrollment" status is "Completed successfully". A message box says "Enrollment completed successfully". A callout box with the number 33 points to the "Continue" button, with the text "Click to Continue".

Enrollment

Direct selection Selection set Enroll

Name Susan Wainwright on 08/07/2004 Overview

Personnel no.

ID Enrollment

Enrollment completed successfully

Continue Confirmation

33. Click to Continue

Offer selection	Enrollment period
07/08/2004 - 08/07/2004	01/01/1800 - 12/31/9999

Costs	Undo selection	Error list
Status	Validity period	Activity

Offer selection	Validity period	Activity
Health Advantage HMO	07/08/2004 - 12/31/9999	
QualChoice HMO	07/08/2004 - 12/31/9999	
Health Advantage POS	07/08/2004 - 12/31/9999	
QualChoice POS	07/08/2004 - 12/31/9999	
Blue Cross Blue Shield PPO	07/08/2004 - 12/31/9999	
Nova Sys HMO	11/21/2004 - 12/31/9999	
NovaSys POS	11/21/2004 - 12/31/9999	
NovaSys PPO	11/21/2004 - 12/31/9999	
High Deductible PPO	11/21/2004 - 12/31/9999	
Basic Life		
US Able (Basic EE Life ASE)	07/08/2004 - 12/31/9999	
Dependent Life		
US Able (Basic DEP Life ASE)	07/08/2004 - 12/31/9999	
Opt. Dep. Life		
US Able (Opt DEP Life ASE)	07/08/2004 - 12/31/9999	
Optional Life		



Create Benefit Enrollment

HIPAA Special Enrollment

The screenshot shows the SAP HRBEN - Benefits Administration interface. The top menu bar includes 'Enrollment', 'Edit', 'Goto', 'System', and 'Help'. The top toolbar contains various icons, including a 'Back' button (represented by a left-pointing arrow). A callout box with the text '34. Click Back' points to this button. The main window is titled 'Enrollment' and displays details for 'Susan Wainwright' on '07/06/2004'. The 'Offer selection' section shows a table of possible offers:

Possible offers	Enrollment period
HIPAA	07/01/2004 - 07/31/2004
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	



Create Benefit Enrollment

HIPAA Special Enrollment

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 18
Name Susan Wainwright
EE group 1 Regular State Pers. area FA01 DFA
EE subgroup UE Employee Cost Center 383201 DFA

Benefits Payroll Taxes Garnishments Time

Infotype text E
General Benefits Information ✓
Family Member/Dependents ✓
Adjustment Reasons ✓
Health Plans ✓
Insurance Plans ✓
Savings Plans ✓
Flexible Spending Accounts ✓
Benefits Medical Information
COBRA-Qualified Beneficiary

Period
Fr. To
Today Curr. week
A11 Current month
From curr. date Last week
To current date Last month
Curr. period Current Year
Choose

Direct selection
Infotype Adjustment Reasons STy

Record created

Note: Record has been created

7-28



Questions and Answers

